

## Chapter 2 - Probate Header - HDR

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## Probate Header Screen

The header screen is used to add information about the juvenile. Users must have security to be able to update case information.

### Accessing the Header Screen:

```
NXT TRAN  P  HDR  TYPE  ADD  CASE NBR  20025555  REC NBR__
```

From the Next Tran Line, enter HDR in the Next Tran field and the option that you want to perform (ADD, INQ, MOD, DEL) along with the case number. Press <Enter> and the system will display the header screen.

The screenshot shows a terminal window titled 'B' with the following content:

```

HEADER ADD
CASE#  03334822  TYPE  XREF #  TYPE  JUDGE  DATE
NAME
ADDRESS
CITY  STATE  ZIP  PHONE
STATUS  0  CLOSED  REOPEN  ATTNY  PUBLIC P
MICRO  DISPO  CODE  ORIG PR
CSE TYPE CHG  FROM TYPE  CHG VENUE  RACE  ANCILLARY
=====

NXT TRAN  P  HDR  TYPE  ADD  CASE NBR  03334822  REC NBR
F2=Nxt Tran  F3=Exit  F4=Prompt  F6=System  F8=Juvenile  F9=Name Lookup  Help
F13=Notes  F14=Dockets  F16=Inv/Date

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```

Following are the field descriptions for the Case Screen.

#### ~Case #~

This area displays the case number. Listed next to the case number will be the suffix number. Suffix numbers are used when there are multiple children in one case.

#### ~Type~

Enter the case type for this case. Press <F4> for a list of case types.

#### ~XRef~

Enter the cross referenced case number in this field.

**~Type~**

Enter the type of the cross referenced case. Press <F4> for a list of valid case types.

**~Judge~**

Enter the judge that is handling this case. Press <F4> for a list of valid jurists. Once a jurist has been entered into this field, the name will display below the field.

**~Date~**

Enter the date the case was filed with the court.

**~Name~**

Enter the name of the individual or deceased person that this case is for.

**~SSNO~**

Enter the social security number if known.

**~Optional Date~**

This date is used for two purposes:

1. Minor Guardianships - Enter the minors date of birth. The minor guardianship review list will NOT pick this case up if the date of birth is not entered in this field.
2. Deceased estates - Enter the decedents date of death.

**~Address, City, State and Zip~**

Enter the address of the individual.

**~Phone~**

Enter the telephone number for the individual.

**~Status~**

This field is used to determine the status of the case. The following should be used.

1. Enter "O" when the case is opened.
2. Enter "C" when the case is closed.
3. Enter "A" when the case is administratively closed.
4. Enter "O" when the case is re-opened.

**~Closed~**

Enter the date the case was closed. If the case has been reopened, enter the most recent closed date. The status field must be changed to "C" when a case is closed. All parties must be discharged before the system will allow the case to be closed.

**~Reopen~**

Enter the date the case was reopened. The status field must be "O" when a case is reopened.

**~Attorney~**

Enter the bar number of the attorney that represents the individual or minor. Press <F4> for a list.

**~Public~**

Enter the public status for this case. Press <F4> for a list of statuses.

**~Micro~**

Enter the microfilm number for this case.

**~Dispo~**

Enter the date that this case was disposed.

**~Code~**

Enter the disposition code for this case.

**~Original PR~**

This field will display the original PR date and party number. The field will only be populated for DE/DA case types.

**~Case Type Change~**

Enter the date that this case type was changed.

**~From Type~**

Enter the previous case type for this case.

**~Chg Venue~**

Enter the date that you received this case from another county.

**~Race~**

Enter the race of the individual or minor in this field.

**~Ancillary~**

Enter an "X" if this case is an ancillary case to the circuit court.

## Adding or Modifying a Case

From the Next Tran Line, enter the following:

### Adding:

```
NXT TRAN  P  HDR  TYPE ADD  CASE NBR  20035555  REC NBR  __
```

### Modifying:

```
NXT TRAN  P  HDR  TYPE MOD  CASE NBR  20035555  REC NBR  __
```

When all information has been added, press <Enter> and the system will display the screen you requested.

```

B
=====
HEADER ADD
CASE#  03334822  TYPE  [ ]  XREF #  [ ]  TYPE  [ ]  JUDGE  [ ]  DATE  [ ]
NAME  [ ]  SSNO  000000000  OPTIONAL DATE  [ ]
ADDRESS  [ ]
CITY  [ ]  STATE  [ ]  ZIP  [ ]  PHONE  [ ]
STATUS  0  CLOSED  [ ]  REOPEN  [ ]  ATTN  [ ]  PUBLIC  P
MICRO  [ ]  DISPO  [ ]  CODE  [ ]  ORIG PR  [ ]
CSE TYPE CHG  [ ]  FROM TYPE  [ ]  CHG VENUE  [ ]  RACE  [ ]  ANCILLARY  [ ]
=====

NXT TRAN  P  HDR  TYPE  ADD  CASE NBR  03334822  REC NBR  [ ]
F2=Nxt Tran  F3=Exit  F4=Prompt  F6=System  F8=Juvenile  F9=Name Lookup  Help
F13=Notes  F14=Dockets  F16=Inv/Date

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```

Enter all information regarding the case and press <Enter>. The system will save the case.

## Inquiring on a Case

From the Next Tran Line enter the following information:

NXT TRAN P HDR TYPE INQ CASE NBR 20035555 REC NBR    

When all information has been added, press <Enter> and the system will display the screen you requested.

```

HEADER INQ
CASE# 03334822 TYPE DE XREF #      TYPE      JUDGE 25275 DATE 6012003
NAME  HEADER, MANUAL,          SSNO 000000000 OPTIONAL DATE
ADDRESS
CITY          STATE      ZIP          PHONE
STATUS 0 CLOSED      REOPEN      ATTN      PUBLIC P
MICRO          DISPO      CODE      ORIG PR
CSE TYPE CHG      FROM TYPE      CHG VENUE      RACE      ANCILLARY
=====

RELATED CIVIL PROCEEDINGS
-----

NXT TRAN P HDR TYPE INQ CASE NBR 03334822 REC NBR
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
F13=Notes F14=Dockets F16=Inv/Date

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```

The system will return the header inquiry screen for you.

## Deleting a Case

From the Next Tran Line enter the following information:

NXT TRAN P HDR TYPE DEL CASE NBR 20035555 REC NBR    

When all information has been added, press <Enter> and the system will delete the requested header.

USER: P44ANGIE      TRANSACTION REQUEST SCREEN      RELEASE: 05/2003

<b>Probate Transactions</b>	<b>Receivable Transactions</b>	<b>Vendor Transactions</b>
HDR - Case Header	ARM - Master Inquire	APD - Other Vendor Maint.
PTY - Party	ARU - Master Maintenance	APA - Attny Vendor Maint.
SCH - Schedule	CHK - Master Payment Inq	APF - Facil Vendor Maint.
SUM - Summary	LUP - Receipt Inquiry/Void	APV - Voucher Processing
MED - Mediation	ARP - Receive Payments	API - Voucher Inquiry
FRD - Financial Order	ADJ - Adjustment	APP - Voucher Payments
DOC - Documents	CRM - Credit Memo	APJ - Voucher Adjustments
		<b>Accounting Transactions</b>
		ACT - Account Maintenance
		BMT - Budget Maintenance
		BIQ - Budget Inquiry
		PRM - Price File Maint.
	<b>Adoption Transactions</b>	<b>Other Options</b>
<b>Reports</b>	ADC - Adoption Case Header	REL - Release Information
RPT/PRO - Probate	ADP - Adoption Party	CNI - Central Name Index
RPT/FIN - Financial	ADE - Adoption Event	CPI - Cir/Pro Name Index
RPT/ADP - Adoption	ADS - Adoption Case Summary	CCL - Central Calendar
	ADF - Adoption Forms	

NXT TRAN P HDR TYPE DEL CASE NBR 00333485 REC NBR    

F3=Exit    F5=Setup    F6=System Commands    F8=Juvenile    F9=Name Lookup  
 F10=Name Update    F14=Docket Request    F16=Inv/Date    F20=File Maintenance    **Help**

Record(s) deleted successfully ←

MA b 21/013

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The system will automatically delete the records.

## Re-Opening a Case

To Re-open a case, modify the header screen and enter the date the case reopened in the reopen field along with an “O” in the status field. Following is an example of this.

From the Next Tran Line, enter the following information.

NXT TRAN	P	HDR	TYPE	MOD	CASE NBR	20035555	REC NBR	___
----------	---	-----	------	-----	----------	----------	---------	-----

When all information has been added, press <Enter> and the system will display the screen you requested.

HEADER MOD  
CASE# 04334849 TYPE GM XREF # TYPE JUDGE 25275 DATE 11152001  
NAME MINOR GUARDIAN,, SSNO 000000000 OPTIONAL DATE 11012001  
ADDRESS  
CITY STATE ZIP PHONE  
STATUS 0 CLOSED REOPEN ATTNY PUBLIC P  
MICRO DISPO 12312001 CODE GTD ORIG PR  
CSE TYPE CHG FROM TYPE CHG VENUE RACE ANCILLARY  
=====

GUARDIANSHIP REVIEWS  
-----  
LAST REVIEW 11/30/2002 PARTY 1  
NEXT REVIEW 11/15/2003

RELATED CIVIL PROCEEDINGS  
-----

NXT TRAN P HDR TYPE MOD CASE NBR 04334849 REC NBR  
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help  
F13=Notes F14=Dockets F16=Inv/Date

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Change the status of the case to “O - Open” and enter the date the case reopened in the “Reopen” field and press <Enter>. The system will reopen the case. The system will generate an event of “RPN - Case Reopened”.

The following rules apply when re-opening a case.

1. A case can't be re-opened if it is open. The case must be closed first.
2. A case can't be opened after it is closed, it must be re-opened.
3. The re-open date must be greater than the file date and less than or equal to today's date.



## Changing the Case Type

To change a case type, enter the following information.

From the Next Tran Line, enter the following information.

NXT TRAN	P	HDR	TYPE MOD	CASE NBR	03334796	REC NBR	___
----------	---	-----	----------	----------	----------	---------	-----

When all information has been added, press <Enter> and the system will display the screen you requested.

```

B
=====
HEADER MOD
CASE#  03334796  TYPE P0  XREF #  TYPE  JUDGE 25275  DATE 11022002
NAME  CASE TYPE CHANGE,,  SSNO 000000000  OPTIONAL DATE
ADDRESS
CITY  STATE  ZIP  PHONE
STATUS 0  CLOSED  REOPEN  ATTNY  PUBLIC P
MICRO  DISPO 2042003  CODE GTD  ORIG PR
CSE TYPE CHG 2042003  FROM TYPE CY  CHG VENUE  RACE  ANCILLARY
=====

RELATED CIVIL PROCEEDINGS
-----

NXT TRAN  P  HDR  TYPE MOD  CASE NBR 03334796  REC NBR
F2=Nxt Tran  F3=Exit  F4=Prompt  F6=System  F8=Juvenile  F9=Name Lookup  Help
F13=Notes  F14=Dockets  F16=Inv/Date

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```

1. Enter the new case type in the type field.
2. Enter the date the case type changed in the “Cse Type Chg” field.
3. Enter the previous case type in the “From Type” field.
4. Press <Enter>.

The system will create an event of “TPC - Type changed” and add it to the schedule screen. Please note that this will count on the caseload report. If this case type change should not be counted on caseload, simply change the case type in the “Type” field and press <Enter>. The type will be changed only.

## Disposing a Case

From the Next Tran Line, enter the following information.

NXT TRAN P HDR TYPE MOD CASE NBR 03334796 REC NBR    

When all information has been added, press <Enter> and the system will display the screen you requested.

```

HEADER MOD
CASE# 03334796 TYPE PO XREF #      TYPE   JUDGE 25275 DATE 11022002
NAME  CASE TYPE CHANGE,,          SSNO 000000000 OPTIONAL DATE
ADDRESS
CITY          STATE  ZIP          PHONE
STATUS 0 CLOSED          REOPEN          ATTNY          PUBLIC P
MICRO          DISPO 2042003 CODE GTD ORIG PR
CSE TYPE CHG 2042003 FROM TYPE CY CHG VENUE          RACE          ANCILLARY
=====
RELATED CIVIL PROCEEDINGS
-----

NXT TRAN P HDR TYPE MOD CASE NBR 03334796 REC NBR
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
F13=Notes F14=Dockets F16=Inv/Date

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```

1. Enter the date the case was disposed in the disposition field.
2. Enter the code for this disposition in the code field. Prompt <F4> for a list of disposition codes.
3. Press <Enter>.

The system will create an event of “DSP “ and add it to the schedule screen. Please note that this will count on the caseload report.

**NOTE:** All cases except MI and JA are disposed of on the Header screen. MI and JA cases are disposed of on the schedule screen. These will be explained further in the Schedule Screen chapter.

## Original Personal Representative and Party Number

From the Next Tran Line, enter the following information.

NXT TRAN P HDR TYPE MOD CASE NBR 03334796 REC NBR    

When all information has been added, press <Enter> and the system will display the screen you requested.

```

B
=====
HEADER MOD
CASE# 00333413 TYPE DE XREF #      TYPE   JUDGE 25275 DATE 5012000
NAME SMITH, JOHN, SSNO 000000000 OPTIONAL DATE
ADDRESS
CITY STATE ZIP PHONE
STATUS 0 CLOSED REOPEN ATTN PUBLIC P
MICRO DISPO 12312001 CODE GTD ORIG PR 5082000 2
CSE TYPE CHG FROM TYPE CHG VENUE RACE ANCILLARY
=====

RELATED CIVIL PROCEEDINGS
-----

NXT TRAN P HDR TYPE MOD CASE NBR 00333413 REC NBR
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
F13=Notes F14=Dockets F16=Inv/Date

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```

The system will evaluate the parties for the case and determine which PR is the original. That date will be inserted into this field with the party number that is associated with it.

**NOTE:** DE and DA case types along with all party types except NPR -No Personal Representative and IRN - Intent to Receive Notice.